



America's Finest City

THE CITY OF SAN DIEGO



# **Assessment Engineer's Report**

## **UNIVERSITY HEIGHTS MAINTENANCE ASSESSMENT DISTRICT**

**Annual Update for Fiscal Year 2008**

**under the provisions of the**

**San Diego Maintenance Assessment District Ordinance  
of the San Diego Municipal Code**

**and**

**Landscaping & Lighting Act of 1972  
of the California Streets & Highways Code**

**Prepared For**

**City of San Diego, California**

**Prepared By**

**Boyle Engineering Corporation**

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San Diego, CA 92111

(858) 268-8080

**July 2007**

# **CITY OF SAN DIEGO**

## **Mayor**

Jerry Sanders

## **City Council Members**

Scott Peters  
District 1 (Council President)

Kevin Faulconer  
District 2

Toni Atkins  
District 3

Anthony Young  
District 4 (Council President Pro Tem)

Brian Maienschein  
District 5

Donna Frye  
District 6

Jim Madaffer  
District 7

Ben Hueso  
District 8

## **City Attorney**

Michael Aguirre

## **Acting Chief Operating Officer**

Jay Goldstone

## **City Clerk**

Elizabeth Maland

## **Independent Budget Analyst**

Andrea Tevlin

## **City Engineer**

Hosseini Ruhi

## **Assessment Engineer**

Boyle Engineering Corporation

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## EXHIBITS

- Exhibit A: District Boundary
- Exhibit B: Estimated Annual Expenses, Revenues & Reserves
- Exhibit C: Assessment Roll

# Assessment Engineer's Report

## University Heights

## Maintenance Assessment District

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### Preamble

Pursuant to the provisions of the "San Diego Maintenance Assessment District Ordinance" (being Division 2, Article 5, Chapter VI beginning at Section 65.0201 of the San Diego Municipal Code), provisions of the "Landscaping and Lighting Act of 1972" (being Part 2 of Division 15 of the California Streets and Highways Code), applicable provisions of "Proposition 218" (being Article XIID of the California Constitution), and provisions of the "Proposition 218 Omnibus Implementation Act" (being California Senate Bill 919) (the aforementioned provisions are hereinafter referred to collectively as "Assessment Law"), in connection with the proceedings for the UNIVERSITY HEIGHTS MAINTENANCE ASSESSMENT DISTRICT (hereinafter referred to as "District"), BOYLE ENGINEERING CORPORATION, as Assessment Engineer to the City of San Diego for these proceedings, submits herewith this report for the District as required by California Streets and Highways Code Section 22565.

FINAL APPROVAL, BY RESOLUTION NO. \_\_\_\_\_ ,  
ADOPTED BY THE CITY COUNCIL OF THE CITY OF SAN  
DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, ON THE  
\_\_\_\_\_ DAY OF \_\_\_\_\_, 2007.

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Elizabeth Maland, CITY CLERK  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

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## Executive Summary

**Project:** University Heights  
Maintenance Assessment District

**Apportionment Method:** Linear Frontage Foot (LFF)

	<b>FY 2007</b>	<b>FY 2008 <sup>(1)</sup></b>	<b>Maximum <sup>(2)</sup> Authorized</b>
<b>Total Parcels Assessed:</b>	132	138	--
<b>Total Estimated Assessment:</b>	\$35,507	\$36,588	--
<b>Total Number of LFF:</b>	5,404.4	5,404.4	--
<b>Assessment per LFF:</b>	\$6.57	\$6.77	\$6.77 <sup>(3)</sup>

<sup>(1)</sup> FY 2008 is the City's Fiscal Year 2008, which begins July 1, 2007 and ends June 30, 2008. Total Parcels Assessed, Total Estimated Assessment, and Total Number of LFF may vary from fiscal prior year values due to parcel changes.

<sup>(2)</sup> Maximum Authorized annual amounts subject to cost-indexing provisions set forth in this Engineers Report.

<sup>(3)</sup> Prior year's maximum authorized annual assessment increased by cost-indexing factor of 3.01%.

**District History:** In Fiscal Year 2001, by a ballot proceeding, majority property owners approved the formation of the District, Fiscal Year 2001 and maximum authorized assessments for subsequent years, and provisions for annual cost-indexing.

**Annual Cost-Indexing:** The maximum authorized assessment rate has been increased based on approved annual cost-indexing provisions.

**Bonds:** No bonds will be issued in connection with this District.

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## Background

The Mid-City Maintenance Assessment District (Mid-City District) was established in July 1987. The original Assessment Engineer's Report is on file in the City of San Diego (City) Clerk's office. The Mid-City District has primarily funded maintenance costs associated with trees and shrubs, landscaped medians, benches, and additional enhanced streetlights located within business district areas. This annual Assessment Engineer's Report is for the University Heights Maintenance Assessment District (District), formerly known as Sub-District #4 of the Mid-City District.

In June 1997, the Mid-City District boundary and apportionment methodology were reviewed and re-formulated, primarily for purposes of increasing assessments, annexing additional areas, adding provisions for cost-indexing of all assessments, and complying with Proposition 218. By a mail ballot proceeding, property owners approved the re-engineering. The Assessment Engineer's Report, preliminarily accepted by Resolution Number R-289040 on August 5, 1998, proposed Fiscal Year 1999 assessments, maximum authorized assessments for subsequent years, and provisions for annual cost-indexing of the maximum authorized assessments.

Recently, the Mid-City District consisted of three (3) separate sub-districts located along Adams Avenue, El Cajon Boulevard, Park Boulevard, and University Avenue. The sub-districts were located as follows:

- ◆ ***Sub-District #4:*** Adams Avenue (from Mission Cliff Drive to Florida Street) and Park Boulevard (from Adams Avenue to Mission Avenue).
- ◆ ***Sub-District #12:*** University Avenue (from 10<sup>th</sup> Avenue to Herbert Street).
- ◆ ***Sub-District #13:*** El Cajon Boulevard (from I-805 to 54<sup>th</sup> Street); divided into two zones: I-805 to 44<sup>th</sup> Street (Zone 1), and 44<sup>th</sup> Street to 54<sup>th</sup> Street (Zone 2).

Over the years, sub-districts were annexed into and de-annexed out of the Mid-City District. Many de-annexed sub-districts were annexed into other districts. Table 1 chronicles the annexations and de-annexations since 1987.

**TABLE 1: Sub-District History**

<b>Sub-District Number</b>	<b>Description</b>	<b>Formed</b>	<b>Modified</b>	<b>Current District</b>
1	University Ave (Fairmount Ave to Marlborough Ave)	1989	2005 (De-annexed)	City Heights
2	University Ave (37th St to Wilson Ave)	1988	2005 (De-annexed)	City Heights
3	Adams Ave	1988	1996 (De-annexed)	Adams Ave
4	Adams Ave (Mission Cliff Dr to Florida St) & Park Blvd (Adams Ave to Mission Ave)	1993	1994 (parcels added)	Mid-City
5	North Park	1988	1996 (De-annexed)	North Park
6	Adams Ave	1988	1996 (De-annexed)	Adams Ave
7	Adams Ave	1989	1996 (De-annexed)	Adams Ave
8*	El Cajon Blvd (Van Dyke Ave to 44th St)	1992	2000 (De-annexed)	--
9	North Park	1992	1996 (De-annexed)	North Park
10*	El Cajon Blvd (37th St to 39th St)	1993	2000 (De-annexed)	--
11*	El Cajon Blvd (I-805 to 37th St)	1997	2000 (De-annexed)	--
12	University Ave (10th Ave to Herbert St)	1999	--	Mid-City
13	El Cajon Blvd (I-805 to 54th St)	2000	--	Mid-City

\* De-annexed and incorporated into Sub-District #13 as part of the Fiscal Year 2001 proceedings.

## District Proceedings for Fiscal Year 2008

This District is authorized and administered under the provisions of the “San Diego Maintenance Assessment District Procedural Ordinance of 1986” (being Division 2, Article 5, Chapter VI beginning at Section 65.0201 of the San Diego Municipal Code), provisions of the “Landscaping and Lighting Act of 1972” (being Part 2 of Division 15 of the California Streets and Highways Code), applicable provisions of “Proposition 218” (being Article XIID of the California Constitution), and provisions of the “Proposition 218 Omnibus Implementation Act” (being California Senate Bill 919) (the aforementioned provisions are

hereinafter referred to collectively as "Assessment Law"). This report has been prepared in compliance with Assessment Law.

The purpose of the proposed proceedings and this Assessment Engineer's Report is to update the District budget and assessments for Fiscal Year 2008. The Fiscal Year 2008 assessments proposed within this Assessment Engineer's Report are equal to or less than the maximum authorized assessment. Therefore, the vote requirements of Section 4 of Article XIID do not apply to these proceedings.

A public hearing will be scheduled where public testimony will be heard by the Council, and the Council may, at its discretion, adopt a resolution ordering the levying of the proposed assessments.

### **Bond Declaration**

No bonds will be issued in connection with this District.

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## **District Boundary**

The Boundary Map and Assessment Diagram for the District are on file in the Maintenance Assessment Districts Section of the Park and Recreation Department of the City of San Diego and by reference are made a part of this report. The Boundary Map and Assessment Diagram for the District are available for public inspection during normal business hours. The District boundary is depicted in Exhibit A.

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## **Project Description**

The project to be funded by the proposed assessments is the maintenance costs associated with landscaped and hardscaped areas, gutter sweeping, sidewalk cleaning, and other specified improvements or services. All improvements to be maintained by the District fall within the dedicated City public rights-of-way.

The engineering drawings for the improvements maintained by the District are on file at Map Records in the City Engineer's office and are incorporated herein. Additional details related to specific District improvements are contained in documents incorporated by reference into prior Assessment Engineer's Reports prepared for purposes of District formation.



The specifications for maintenance to be performed are contained in City Contract Numbers L3261/00, L3768/01, L3491/01, which are incorporated herein by reference and are on file with the City Clerk and the Park and Recreation Department. The specifications are available for public inspection during normal business hours.

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## **Separation of General and Special Benefits**

Consistent with City policy for the public at large, the City will contribute for lighting maintenance and energy costs an amount equivalent to that used for City minimum required streetlights (see City Council Policy 200-18 for lighting standards). These cost allocations, reviewed and adjusted annually by the City, are considered to be “general benefits” administered by the District. All other maintenance, operations, and administration costs associated with the District, which exceed the City’s contribution to the public at large, are accordingly considered to be “special benefits” funded by the District.

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## **Cost Estimate**

### **Estimated Costs**

Estimated Fiscal Year 2008 annual expenses, revenues, reserves, and assessments (provided by the City) are included as Exhibit B hereto.

### **Annual Cost-Indexing**

With the passage of Proposition 218, any proposed increase in assessments must be placed for approval before the property owners by a mail ballot and a public hearing process, similar to these proceedings. A majority of ballots received must be affirmative for the City Council to confirm and levy the increased assessments. For small assessment districts or districts with relatively low dollar assessments, the cost of an engineer’s report, balloting, and the public hearing process can potentially exceed the total cost of the increase. These incidental costs of the proceedings can be added to the assessments, resulting in even higher assessments.

Indexing assessments annually to the San Diego Consumer Price Index for Urban Consumers (SDCPI-U), as approved by the District property owners, allows for minor increases for normal maintenance and

operating cost escalation without incurring the costs of the Proposition 218 ballot proceedings. Any significant change in the assessment initiated by an increase in service provided or other significant changes to the District would still require the Proposition 218 proceedings and property owner approval.

The maximum authorized assessment established in the Fiscal Year 1998 proceedings are authorized to be indexed (increased or decreased) annually by the factor published in the SDCPI-U. The maximum authorized assessment rates contained within this Assessment Engineer's Report have been indexed in accordance with these cost-indexing provisions.

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## **Method of Apportionment**

### **Estimated Benefit of the Improvements**

The Transportation Element of the City's General Plan and the general policy recommendations found in the local Community Plan establish several goals for the community's transportation system. The improvements being maintained by the District are consistent with the plans' goals for safety and pleasing aesthetics. All benefits assessed to the District are special to this District and are distinct from other parcels in the City.

The improvements (enhanced landscape, streetscape, medians, benches, and additional street lighting) benefit parcels by enhancing the visual aesthetics of the business districts, establishing a continuity of business district appearance, increasing land and business values, promoting public safety and a sense of security for the clientele and employees through increased night lighting, reducing graffiti problems, and creating a sense of community identity and pride.

### **Apportionment Methodology**

It is estimated that the benefit received by each parcel is directly proportional to the linear front footage of each parcel fronting the improvements. The total cost has been divided by the total linear front footage of all parcels within the District to determine the unit assessment rate, or cost per linear frontage foot (LFF).

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## Summary Results

The District boundary is presented in Exhibit A.

An estimate of the costs of the improvements provided by the District is included as Exhibit B to this report.

The assessment methodology utilized is as described in the text of this report. Based on this methodology, the LFF and Fiscal Year 2008 District assessment for each parcel were calculated and are shown in the Assessment Roll (Exhibit C).

Each lot or parcel of land within the District has been identified by unique County Assessor's Parcel Number on the Assessment Roll and the Boundary Map and Assessment Diagram referenced herein. The net assessment for each parcel for Fiscal Year 2008 can be found on the Assessment Roll.

This report has been prepared and respectfully submitted by:

BOYLE ENGINEERING CORPORATION

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Eugene F. Shank, PE

C 52792

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Greg S. Keppler, EIT

I, \_\_\_\_\_, as CITY CLERK of the CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, do hereby certify that the Assessment as shown on the Assessment Roll, together with the Assessment Diagram, both of which are incorporated into this report, were filed in my office on the \_\_\_\_\_ day of \_\_\_\_\_, 2007.

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Elizabeth Maland, CITY CLERK  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

I, \_\_\_\_\_, as CITY CLERK of the CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, do hereby certify that the foregoing Assessment, together with the Assessment Diagram incorporated into this report, was approved and confirmed by the CITY COUNCIL of said City on the \_\_\_\_\_ day of \_\_\_\_\_, 2007.

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Elizabeth Maland, CITY CLERK  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

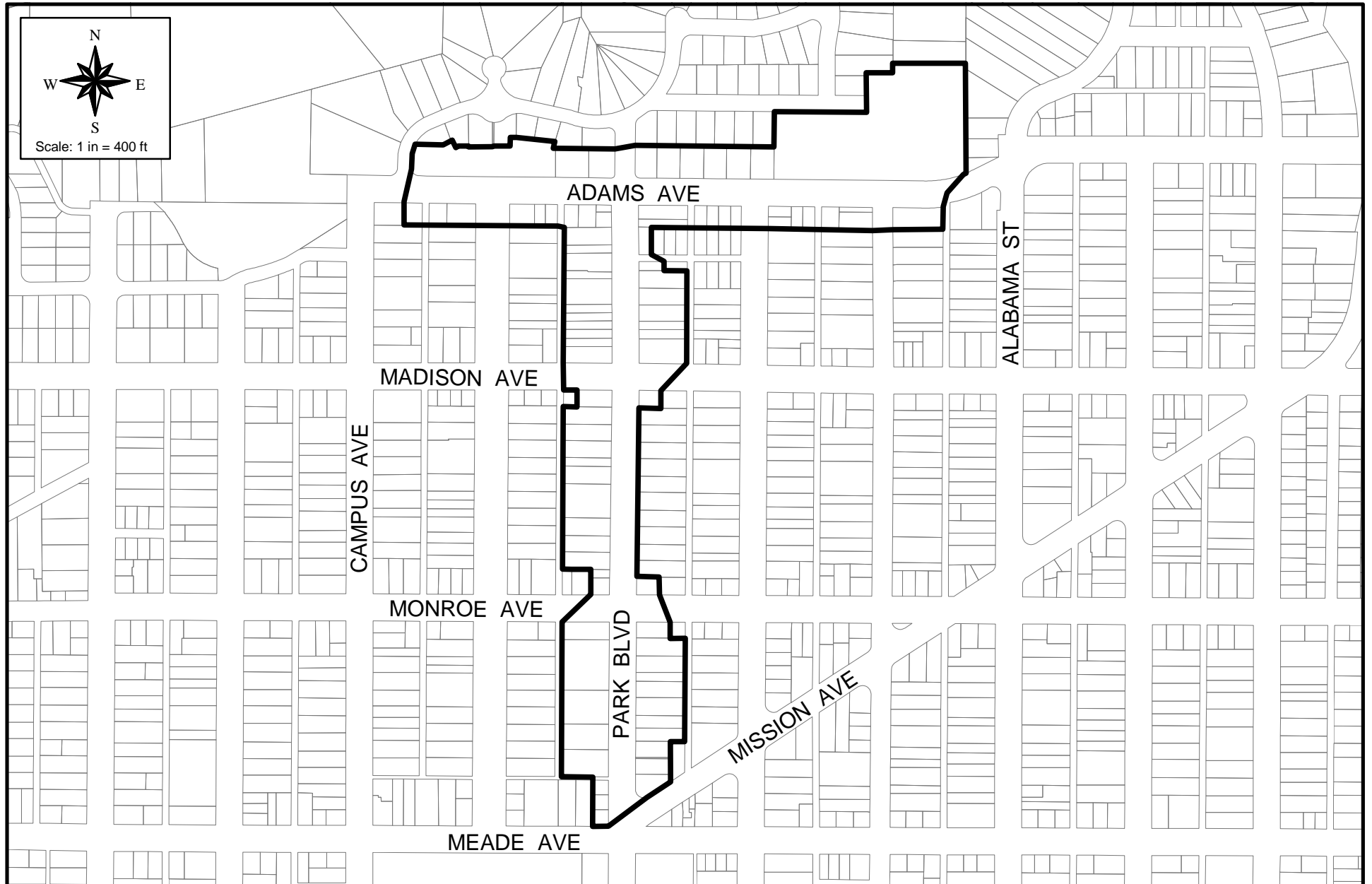
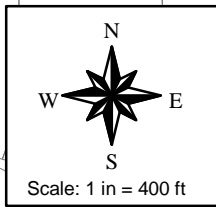
I, \_\_\_\_\_, as CITY ENGINEER of the CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, do hereby certify that the foregoing Assessment, together with the Assessment Diagram was recorded in my office on the \_\_\_\_\_ day of \_\_\_\_\_, 2007.

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Hosseini Ruhi, CITY ENGINEER  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

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# **EXHIBIT A**



**BOYLE**

## University Heights Maintenance Assessment District

**EXHIBIT A**

# **EXHIBIT B**

# EXHIBIT B - Estimated Annual Expenses, Revenues & Reserves

University Heights - Fund 70273

	FY 2006 BUDGET	FY 2007 BUDGET	FY 2008 BUDGET
<b>BALANCE FROM PRIOR YEAR</b>	\$ 37,162	\$ 40,838	\$ 39,333
<b>REVENUE</b>			
Assessments	\$ 34,180	\$ 35,507	\$ 36,588
Interest	\$ 1,125	\$ 1,000	\$ 800
Environmental Growth Fund	\$ -	\$ -	\$ -
Gas Tax Fund	\$ -	\$ -	\$ -
General Fund	\$ -	\$ -	\$ -
Miscellaneous	\$ -	\$ -	\$ -
<b>TOTAL REVENUE</b>	\$ 35,305	\$ 36,507	\$ 37,388
<b>TOTAL BALANCE AND REVENUE</b>	\$ 72,467	\$ 77,345	\$ 76,721
<b>EXPENSE</b>			
<b>OPERATING EXPENSE</b>			
Personnel	\$ 4,332	\$ 4,351	\$ 4,561
Contractual	\$ 22,430	\$ 20,533	\$ 22,456
Incidental	\$ 4,586	\$ 5,041	\$ 4,654
Utilities	\$ 10,736	\$ 11,518	\$ 11,495
<b>TOTAL OPERATING EXPENSE</b>	\$ 42,084	\$ 41,443	\$ 43,166
<b>RESERVE</b>			
Contingency Reserve	\$ 30,383	\$ 35,281	\$ -
<b>TOTAL RESERVE</b>	\$ 30,383	\$ 35,281	\$ 33,555
<b>BALANCE</b>	\$ -	\$ 621	\$ -
<b>TOTAL EXPENSE, RESERVE AND BALANCE</b>	\$ 72,467	\$ 77,345	\$ 76,721



# **EXHIBIT C**

Due to the size of the Assessment Roll (Exhibit C), only limited copies are available. Please contact the City of San Diego, Park & Recreation Department, Open Space Division, Maintenance Assessment Districts Program at (619) 685-1350 to review the Assessment Roll.